

Processing standards – Quick reference guide

Accepting forms	Forms must be fully completed – discretion can be applied. Editable pdf forms can be completed on a client's behalf (incl. additional steps).
Agents	An Appointment of Agent form and agent identification is needed. In some cases, a Power of Attorney, Court Order, or a letter/privacy waiver with the required information can be accepted instead of a form. These can also be accepted electronically (eg email).
Applications	May be accepted online, by paper form or an editable pdf.
Authentication	Good quality notes that fully explain your decision are important to ensure the relevant criteria is met and approval has been obtained.
Bank accounts	Evidence isn't needed if: <ul style="list-style-type: none">• there's already evidence recorded• we've made payments to this account before• there's a change in suffix only. Evidence must show bank logo, account number and name. Evidence can also be accepted electronically (eg email) or by sighting online banking .
Cancellation	Information and/or evidence of the client's circumstances should be recorded at cancellation.
Child changes	Evidence is required when including or excluding a child.
Extra Help evidence	Evidence (eg quotes) isn't always needed. In some cases, it's required by law or can be requested using discretion. If evidence is needed, it can be accepted by directly sourcing this yourself on a website or directly with the supplier (with permission). It can also be accepted electronically.
Hardship evidence	
Identification	For new clients we'll accept two primary forms of identification. If the client doesn't have these, we'll accept one primary and one supporting form of ID. As a last resort, we can accept two supporting forms of ID to allow clients to get a primary form of ID within 28 days. In this case, we may be able to assist clients with the cost of obtaining a primary identification.
Income and assets	Evidence isn't needed: <ul style="list-style-type: none">• when it's already held in the system, or• for first-time employment income. Unless the above applies, evidence is needed for: <ul style="list-style-type: none">• applications (unless already receiving ongoing assistance)• all other new or changed income (excluding employment related income) and assets,• when required at a review of annual income or annual review of Income-Related Rent. Evidence can be accepted electronically.
Inland Revenue number	You can accept and record written or verbal evidence of a client's IR number.
Obligation failures	An obligation failure must only be initiated when a client or their partner fails to comply without a good and sufficient reason.
Partner changes	Evidence is required when including a partner.
Redirection of benefit payment	A Redirection of Benefit Payment application form is needed along with other supporting evidence – such as a Court Order can be accepted instead of a form. The form and evidence can also be accepted electronically (eg email).
Scanning and recording	Documentation only needs to be scanned when it's not held already on file. There's more guidance available about what to scan and what not to on Doogle. Scanned documentation and good quality notes are important to understand clients' circumstances and the decisions you've made.
Transfers	A new application form and supporting evidence may be needed in some cases. It's important to ensure the client understands their obligations .